

APPENDIX M

ADDITIONAL INSTRUCTIONS--GUARANTEED COLAS  
(January 28, 1982)

There are three types of wage increases that are referred to as "cost-of-living adjustments" in collective bargaining agreements:

- 1) An adjustment in wages directly linked by formula to a change in the CPI
- 2) An adjustment in wages directly linked by formula to a change in the CPI, but with a "guaranteed" minimum.
- 3) A guaranteed increase not linked by formula to a change in the CPI, but referred to in the contract as a "cost-of-living" increase.

Following is the protocol for handling these types of wage changes in CWD listings and coding wage change statistics.

Type 1) is listed as a cost-of-living adjustment in CWD and coded as a COLA on the coding card.

Type 2) will be listed as in following example, which assumes a 20-cent total increase:

"Quarterly cost-of-living adjustment consisting of 5 cents guaranteed amount not contingent on the movement of the CPI, and 15 cents resulting from a rise in the CPI."

For coding, the guaranteed amount is treated as a deferred increase; the CPI generated amount is treated as a COLA.

Type 3) is listed as a "'guaranteed' cost-of-living increase not contingent on the movement of a price index" but is coded as a deferred increase.

ADDITIONAL INSTRUCTIONS--CODING INSTRUCTIONS FOR DEACTIVATED  
RECORDS  
(Not dated)

1. Plant closed, or the number of workers in the bargaining unit dropped below 800 and it is not expected to increase.
  - :Record should be deactivated. Indicate the reason for dropping the record on the coding card (i.e. employ <500) and deactivate the record for all negotiation #'s from the data base.
2. Temporary drop in employment (Current employment below 800)
  - :Code the terms of the latest agreement including all wage and COLA information and current employment data
  - :Continue to use code '1' in typeworker field BA24
  - :Check the employment on the next scheduled negotiation date-- if the employment continues to drop as in 1 above.
3. Change or correction in the composition of the bargaining unit resulting in the merger of two or more units.
  - :The record of the unit with the largest employment count is maintained, with the schedule #s of the records merged into the situation indicated on the top of the coding card.
  - :The records for all situations merged into the larger units are amended to show typeworker '4' in BA24. Do not deactivate these records since the information is needed to compile data on when the same parties previously bargained. These code '4' records will be deactivated when they are no longer needed.

ADDITIONAL INSTRUCTIONS-CONFIDENTIAL SITUATIONS  
(MAY 5, 1993)

When a responding official requests that we keep their settlement data as confidential, be sure that you enter the word "Confidential" in the name field on the coding card so that it will be recorded on the data base. This will enable us to suppress these data when responding to requests for data by bargaining unit.

In addition, when calling for settlement data on a situation that was confidential the last time, ask if we may publish data for the new settlement. The terms may not be as sensitive this time or the responding official may be different.

CODING THE EXPIRATION DATE FOR CONTRACTS EXPIRING AFTER DECEMBER 31, 1999--dated August 31, 1994

The data base cannot handle dates beyond December 31, 1999. When a new contract has an expiration date beyond December 31, 1999, code December 31, 1999 as the expiration date and adjust the wage changes to ensure that over the contract life change is correct.

Since the new data base will accommodate dates beyond December 31, 1999, we want to keep track of any situations that we need to change. To accomplish this, send Bill an e-mail message with the schedule number, negotiation number, company/organization name and the information covering January 1, 2000 and later for any situations where the actual dates are later than December 31, 1999. As more situations have dates beyond December 31, 1999, this will also enable us to determine the extent of the problems.

You must remember for the CWC deferred listings that the information on the deferreds that you receive from Doug may have amounts or dates that were changed to accommodate the year 2000 problem. While these cases may not be too frequent in the near future, you should review the original settlement listing to verify the amounts and dates. Reviewing the original listings for all the deferreds should be done in any case to ensure accuracy between the data base and the listings.